5615-2
3/27/90

FEBRUARY 1990

OREGON LABOR TRENDS

State of Oregon • Employment Division • Department of Human Resources

INDICATORS

UNEMPLOYMENT RATE

Oregon (Seas. Adj.)		
Jan.	1990	5.2
Dec.	1989	5.3
Jan.	1989	5.4
United States (Seas. Adj.)		
Jan.	1990	5.3
Dec.	1989	5.3
Jan.	1989	5.4

WAGE AND SALARY EMPLOYMENT INDEX

Oregon (1977=100)		
Jan.	1990	131.6
Dec.	1989	130.6
Nov.	1989	130.4
Oct.	1989	130.1
Sept.	1989	129.7

PRODUCTION WORKER AVERAGE HOURLY EARNINGS

Oregon		
Dec.	1989	$11.02
Nov.	1989	$10.83
Dec.	1988	$10.69

PRODUCTION WORKER AVERAGE WEEKLY HOURS

Oregon		
Dec.	1989	40.0
Nov.	1989	39.0
Dec.	1988	40.1

CONSUMER PRICE INDEX (CPI)

1982-84=100
ALL URBAN CONSUMERS

Portland-Vancouver	
July-Dec. 1989	121.6
Yearly change	4.9%
Annual Average 1989	120.4
Yearly change	5.0%
United States	
Jan. 1990	127.4
Yearly change	5.2%
Annual Average 1989	124.0
Yearly change	4.8%

Portland Hotline 326-4132

INMIGRATION REVISITED OR HOW LONG THE LABOR SHORTAGE?

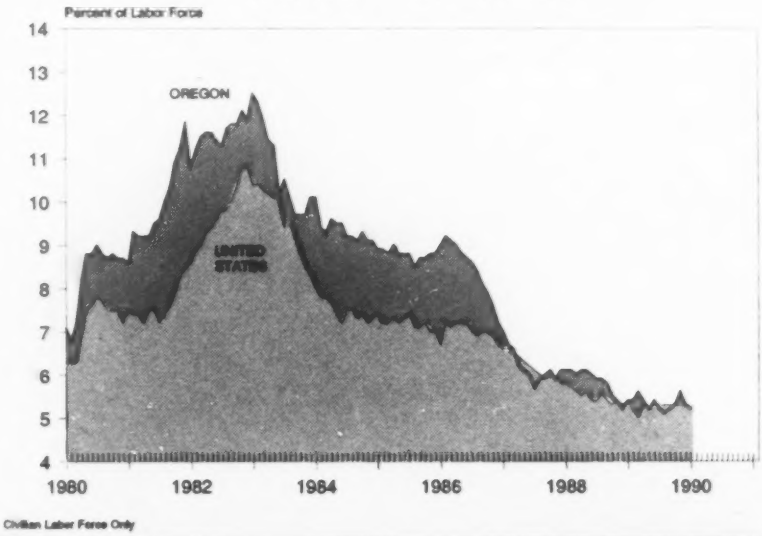
Frank Ryals

Foretelling the future has been, throughout history, either a God-given responsibility, a mystical scam, or a matter of survival. All cultures have had their prophets, oracles, seers, shamans, and fortune tellers. Those who were right were rewarded with status in the tribe second to none, and even fame throughout the ages. Those who were wrong were branded as crooks or charlatans and were disgraced, banished, killed, or worse.

With such dire consequences at stake, those modern shamans known as economists do try, despite ample evidence to the contrary, to consider the effects of every measurable economic force, as well as some unmeasurable ones, when they augur the future of the economy. The fact that so many of them are wrong so often and aren't disgraced, banished, killed, or worse, should be a clue as to just how difficult the economists' task is.

In Oregon, the task has become even more difficult. Until the 1980s, certain social variables behaved in ways which were so dependable that they could be treated as assumptions, or constants, in predicting economic trends. Chief among these old standbyes were population growth and movement. Traditionally, Oregon's population grew in a steady, unbroken upward line, through both natural increase and inmigration. Oregon's economy grew almost steadily, too. Therefore, increases in employment would immediately be mirrored by decreases in unemployment. Now things aren't so simple. Population variables which used to work in concert now might seem to cancel each other. Here are two population issues which affect not only employment and unemployment levels in Oregon, but also make their prediction more difficult.

SEASONALLY ADJUSTED UNEMPLOYMENT RATES
OREGON AND THE UNITED STATES



OREGON RESIDENT LABOR FORCE
(BY PLACE OF RESIDENCE)

	JAN.1/ 1990	DEC.2/ 1989	JAN. 1989	CHANGE FROM DEC. 1989	CHANGE FROM JAN. 1989
CIVILIAN LABOR FORCE 3/	1,439,600	1,420,900	1,422,800	18,700	16,800
UNEMPLOYMENT	87,800	70,700	89,900	17,100	- 2,100
PERCENT OF LABOR FORCE	6.1	5.0	6.3	XXX	XXX
SEASONALLY ADJUSTED PERCENT	5.2	5.3	5.4	XXX	XXX
TOTAL EMPLOYMENT 4/	1,351,800	1,350,200	1,332,900	1,600	18,900

1/ Preliminary
2/ Revised
3/ Includes employed and unemployed individuals 16 years and older, adjusted for multiple job-holding and commuting.
4/ Includes nonagricultural wage and salary, self-employed, unpaid family workers, domestics, farm workers, and labor disputants.
5/ Includes full- and part-time nonfarm wage and salary workers in pay periods including the 12th of the month. Proprietors, self-employed, private household workers and armed forces excluded. Note: These data are estimated in cooperation with the U.S. Bureau of Labor Statistics and the Employment and Training Administration. All data are based on the 1987 Standard Industrial Classification (SIC) codes.
6/ Total nonagricultural wage and salary employment, seasonally adjusted, and indexed to 1977. Data on the earlier index (1972 = 100) can be converted to the 1977 base period by multiplying by a factor of 0.8264, the ratio between 1972's annual average employment (774,300) and that of 1977 (936,900).
7/ Goods producing industries include manufacturing, mining, and construction.
8/ Service producing industries include transportation, communications, and utilities, trade, finance, insurance, and real estate, services, and government.
9/ Series break. Data for 1988 and thereafter are not comparable to those for 1987 and before.
10/ Employees involved in labor disputes are not included in wage and salary employment counts.

The Labor Shortage

For the nation as a whole, the labor shortage and how we choose to go about solving it will be the single biggest labor issue of the 1990s. This shortage has two components:

- The body count shortage: The number of young people entering the labor force will continue to decline for several years before turning up in the latter half of the decade, but not nearly to baby boom levels.
- The skills mis-match. Many Oregonians do not possess the skills needed for many jobs in a world of work which has been forever altered by automated manufacturing, communication, and information systems. Retraining of these people will be necessary, but expensive.

Please see the chart which displays the number of job openings listed with the Employment Division which were unfilled for at least thirty days. Although down a bit from 1988, the numbers document the difficulties many employers are experiencing in finding workers.

Inmigration

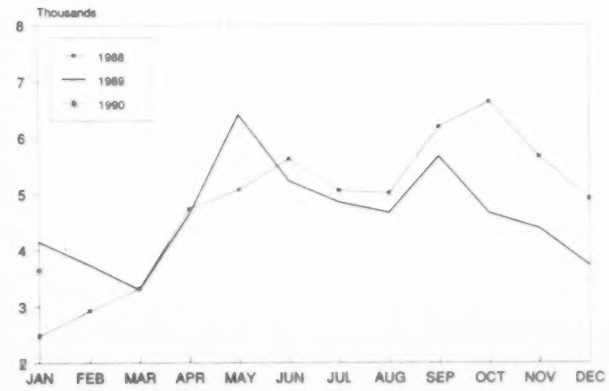
The strong economy and the labor shortage have caused an increase of people coming to Oregon looking for work. No one knows exactly how many, but some evidence suggests that their numbers have increased in the last two years. Please note the graph showing, by month, the numbers of out-of-state driver's licenses exchanged for Oregon licenses.

To what extent inmigrants have softened the labor shortage crunch is not yet known. In the long run, though, these latter day pioneers might ease some of the pinch caused by the labor shortage.

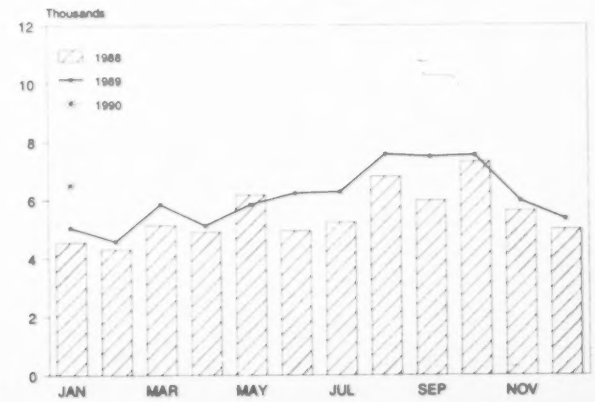
These two issues encompass nearly every other major challenge facing the state in the coming decade. Education, affirmative action, welfare reform, substance abuse, childrens' issues, immigration policy, and land use are just a few related topics which come to mind in relation to the above two.

With these above issues in mind, it should come as no surprise that January 1990 was a very good month. Total nonfarm wage and salary employment stood at 1,203,100. Though this represents about 27,000 fewer workers

NONAG JOB OPENINGS UNFILLED 30+ DAYS
OREGON EMPLOYMENT DIVISION



OUT-OF-STATE LICENSES SURRENDERED
TO OBTAIN AN OREGON LICENSE



OREGON NONAGRICULTURAL WAGE AND SALARY EMPLOYMENT
(BY PLACE OF WORK)

INDUSTRY	JAN.1/ 1990	DEC.2/ 1989	JAN. 1989	CHANGE FROM DEC. 1989	CHANGE FROM JAN. 1989
TOTAL 5/	1,203,100	1,230,100	1,159,500	- 27,000	43,600
WAGE & SALARY EMPLOYMENT INDEX 6/	131.6	130.5	126.7	XXX	XXX
GOODS PRODUCING INDUSTRIES 7/	256,700	262,700	248,600	- 6,000	8,100
SERVICE PRODUCING INDUSTRIES 8/	946,400	967,400	910,900	- 21,000	35,500
TOTAL MANUFACTURING	213,200	216,200	209,000	- 3,000	4,200
DURABLE GOODS	157,700	159,100	156,300	- 1,400	1,400
LUMBER & WOOD PRODUCTS	65,800	66,700	67,500	- 900	- 1,700
LOGGING	10,500	11,400	11,800	- 900	- 1,300
SAWMILLS	22,700	22,800	22,200	- 00	500
VENEER & PLYWOOD	15,700	15,900	17,300	-	- 1,600
MILLWORK & STRUCTURAL WOOD	10,800	10,500	10,100	300	700
MOBILE HOMES	1,900	1,900	1,800	0	100
OTHER WOOD PRODUCTS	4,200	4,200	4,300	0	- 100
FURNITURE AND FIXTURES	2,800	2,900	2,900	- 100	- 100
STONE, CLAY, GLASS & CONCRETE	4,000	4,200	4,000	- 200	0
PRIMARY METALS	11,300	11,300	10,400	0	900
BLAST FURNACES, IRON & STEEL 9/	5,800	5,800	5,300	0	500
NONFERROUS METALS 9/	5,500	5,500	5,100	0	400
FABRICATED METALS	11,800	11,800	12,200	0	- 400
FABRICATED STRUCTURAL METALS	4,900	4,900	5,300	0	- 400
OTHER FABRICATED METALS	6,900	6,900	6,900	0	0
MACHINERY	17,700	17,800	16,900	- 100	800
OFFICE & COMPUTING MACHINES	4,700	4,700	4,200	0	500
OTHER MACHINERY	13,000	13,100	12,700	- 100	300
ELECTRONIC & OTHER ELECTRIC EQUIPMENT 9/	16,500	16,400	15,100	100	1,400
TRANSPORTATION EQUIPMENT	11,900	12,100	11,000	- 200	900
INSTRUMENTS & RELATED PRODUCTS 9/	12,200	12,200	12,600	0	- 400
MISCELLANEOUS MANUFACTURING	3,700	3,700	3,700	0	0
NONDURABLE GOODS	55,500	57,100	52,700	- 1,600	2,800
FOOD & KINDRED PRODUCTS	20,400	21,500	19,400	- 1,100	1,000
CANNING & PRESERVING	9,700	10,300	9,200	- 600	500
OTHER FOOD PRODUCTS	10,700	11,200	10,200	- 500	500
TEXTILE MILL PRODUCTS	1,700	1,800	1,700	- 100	0
APPAREL	2,700	2,800	2,600	- 100	100
PAPER & ALLIED PRODUCTS	9,200	9,100	8,400	100	800
PRINTING & PUBLISHING	13,800	14,000	13,100	- 200	700
CHEMICALS & ALLIED PRODUCTS	2,200	2,200	2,100	0	100
PETROLEUM & ASPHALT PRODUCTS	400	400	400	0	0
RUBBER & PLASTIC PRODUCTS	4,700	4,800	4,600	- 100	100
LEATHER PRODUCTS	400	500	400	- 100	0
TOTAL NONMANUFACTURING	989,900	1,013,900	950,500	- 24,000	39,400
MINING & QUARRYING	1,200	1,400	1,100	- 200	100
CONSTRUCTION	42,300	45,100	38,500	- 2,800	3,800
BUILDING CONSTRUCTION	10,900	11,100	9,800	- 200	1,100
HEAVY CONSTRUCTION	4,500	5,400	5,000	- 900	- 500
SPECIAL TRADE CONTRACTORS	26,900	28,600	23,700	- 1,700	3,200
TRANSPORTATION, COMMUNICATIONS, & UTILITIES	63,600	65,200	61,000	- 1,600	2,600
TRANSPORTATION	42,200	43,800	40,100	- 1,600	2,100
RAILROAD	3,800	3,800	3,900	0	- 100
TRUCKING & WAREHOUSING	24,000	25,700	23,000	- 1,700	1,000
OTHER TRANSPORTATION	14,400	14,300	13,200	100	1,200
COMMUNICATIONS	12,500	12,500	12,400	0	100
UTILITIES	8,900	8,900	8,500	0	400
TRADE	310,900	324,800	294,500	- 13,900	16,400
WHOLESALE TRADE	80,000	80,500	74,500	- 500	5,500
DURABLE GOODS	46,600	46,900	44,000	- 300	2,600
MACHINERY, EQUIPMENT, & SUPPLIES	10,800	11,000	10,400	- 200	400
OTHER DURABLE GOODS	35,800	35,900	33,600	- 100	2,200
NONDURABLE GOODS	33,400	33,600	30,500	- 200	2,900
GROCERIES & RELATED PRODUCTS	13,200	13,300	11,700	- 100	1,500
OTHER NONDURABLE GOODS	20,200	20,300	18,800	- 100	1,400
RETAIL TRADE	230,900	244,300	220,000	- 13,400	10,900
BUILDING MATERIALS & GARDEN SUPPLIES	8,200	8,500	6,900	- 300	1,300
GENERAL MERCHANDISE	31,000	34,600	29,300	- 3,600	1,700
FOOD STORES	40,600	41,200	37,100	- 600	3,500
AUTO DEALERS & SERVICE STATIONS	28,200	28,900	27,800	- 700	400
APPAREL & ACCESSORY STORES	9,800	11,200	9,400	- 1,400	400
FURNITURE & HOME FURNISHINGS	9,800	10,100	9,000	- 300	800
EATING & DRINKING PLACES	79,500	82,400	77,000	- 2,900	2,500
MISCELLANEOUS RETAIL	23,800	27,400	23,500	- 3,600	300
FINANCE, INSURANCE, & REAL ESTATE	74,900	75,400	73,100	- 500	1,800
FINANCE	28,000	28,000	27,600	0	400
INSURANCE	21,900	22,000	22,100	- 100	- 200
REAL ESTATE	25,000	25,400	23,400	- 400	1,600
SERVICES	278,400	281,100	268,000	- 2,700	10,400
HOTELS & OTHER LODGING PLACES	16,900	17,700	16,500	- 800	400
PERSONAL SERVICES	11,000	10,700	10,700	300	300
BUSINESS SERVICES	45,300	45,600	43,800	- 300	1,500
AUTOMOTIVE & MISC. REPAIR SERVICES	15,100	15,200	14,400	- 100	700
MOTION PICTURES & AMUSEMENTS	13,800	13,700	13,500	100	300
HEALTH SERVICES	84,100	84,100	79,700	0	4,400
LEGAL SERVICES	8,600	8,600	8,500	0	100
PRIVATE EDUCATION	13,500	14,600	14,600	- 1,100	- 1,100
SOCIAL SERVICES	25,100	25,500	23,500	- 400	1,600
ENGINEERING & MANAGEMENT SERVICES	19,300	19,100	18,200	200	1,100
OTHER SERVICES & NEC	25,700	26,300	24,600	- 600	1,100
GOVERNMENT	218,600	220,900	214,300	- 2,300	4,300
FEDERAL GOVERNMENT	31,800	32,900	30,900	- 1,100	900
STATE GOVERNMENT	59,200	59,600	59,000	- 400	200
EDUCATION	24,700	25,500	24,500	- 800	200
OTHER STATE	34,500	34,100	34,500	400	0
LOCAL GOVERNMENT	127,600	128,400	124,400	- 800	3,200
EDUCATION	81,300	82,000	79,800	- 700	1,500
OTHER LOCAL	46,300	46,400	44,600	- 100	1,700
LABOR-MANAGEMENT DISPUTES 10/	500	400	1,200	100	- 700

employed than in December. Oregon employers were expected to lay off over 36,500, so almost 10,000 more Oregonians than expected are still on the payrolls. This accounts for January's higher wage and salary employment index of 131.6, up from 130.6 in December. This index sees through the normal seasonal ups and downs and captures changes actually caused by growth or decline of the economy.

In January, logging, nondurable goods manufacturing, and mining lost more jobs than expected. The relatively small losses in these industries were overwhelmed by those which, for a variety of reasons, have retained a great many more workers than anticipated.

To be sure, employment growth in Oregon's manufacturing sector has slowed considerably in 1989. Leaning most heavily on the brakes were veneer and plywood (-1,600) and logging (-700).

At present, though, lumber and wood products is showing no strong up or down trend. Around 50 veneer and 25 plywood jobs will be lost in February as Willamette Industries closes one mill and lays off the relief shift in another, both in Sweet Home. However, 400 plywood jobs should reappear by the end of the month when the Champion International mill in Roseburg resumes production. Logging declines were related to both weather and to mill closures and seasonal layoffs.

Elsewhere in durable goods manufacturing, however, average employment gains in the past year shine like a clear January day. Examples include:

Primary Metals	(+800)
Fabricated Metals	(+1,100)
Machinery	(+800)
Electrical & Electronic Equip.	(+1,500)

In addition, printing and publishing, and rubber and plastics manufacturing each reached all-time high employment levels last year. All of the above are key industries to watch for those concerned with diversifying the Oregon economy. Their continued growth gives parts of the state a better chance to dodge any bullets of recession which might be fired in the future. Unfortunately, they cannot help areas of the state in which they are not located.

The recent announcement of the impending layoff of around 600 workers at Tektronix feels like a cold rain on the above numbers for electronics employment. Oregon's high tech manufacturers are now in a more mature industry environment with stiff competition, and to expect them to add workers as they did when the industry was young and in its high growth phase is simply not realistic. Instead, these firms probably will grow slowly in the coming months, and will suffer occasional setbacks like this one.

The only remaining bad news in January was nondurable goods manufacturing, including food and kindred products, which lost 700 more jobs than expected. Bad weather added to other factors causing a decrease in seafood canning on the Oregon coast.

Shifting from manufacturing to construction, the word is very good indeed. This industry has awakened from its recession-induced coma of the early 1980s, and is growing like a Washington County suburb. The state's continuing prosperity and its accompanying inmigration have spurred the need for more commercial, industrial, and residential building. Long-dormant issues like land-use planning, especially urban growth boundaries, will again become hot topics for Oregon communities and the state as a whole.

The headline and the bottom line for all of the state's service-producing sector is that almost no one laid off as many workers as expected after the holidays. In some industries, this mid-winter strength is because there is simply more work to be done. In others, employers seem to have altered their holiday hiring practices, adding fewer temporary workers in December, and so having fewer to lay off in January.

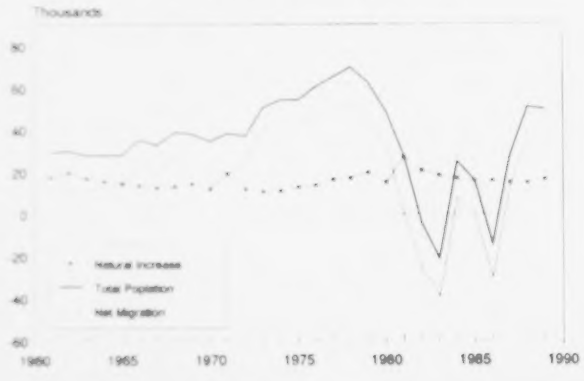
Openings of new stores have cushioned the normal decrease of employment in trade, for both wholesale and retail firms. Wholesale grocers have led the way with a more 100 drop in employment. Retail food stores lost 600, far less than the model forecast.

Real estate, an industry directly affected by construction activity, lost only half the expected jobs in the first month of the new year. This counter-seasonal strength is related to both the prosperity of Oregonians and to the influx of new residents.

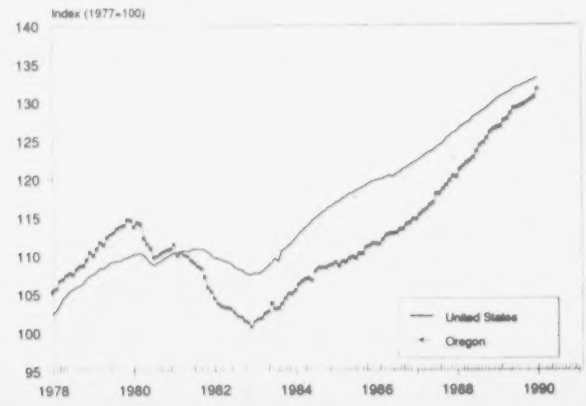
The service sector also remained buoyant in January. Employment services lost only 300 jobs instead of the expected 2,000. This was a reflection of the less-than-normal holiday hiring mentioned earlier.

Most of the remainder of the predicted layoffs which didn't occur in services didn't occur in health services. Health showed no change in employment when a drop of 900 was expected. Both the labor shortage and inmigration have been felt acutely by health services. These firms are caught between the rock of holding down labor costs while serving an expanding and aging population, and the hard place of the labor shortage. This industry is projected to experience worker shortages through the middle of the decade.

COMPONENTS OF OREGON POPULATION GROWTH
CHANGE FROM PREVIOUS YEAR



NONFARM WAGE & SALARY EMPLOYMENT INDEXES
(SEASONALLY ADJUSTED)



State of Oregon
EMPLOYMENT DIVISION
Department of Human Resources

Research and Statistics
March 1989 Benchmark
February 1990

OREGON RESIDENT LABOR FORCE, UNEMPLOYMENT & EMPLOYMENT 1989 1/

	Annual 2/ Average	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
CIVILIAN LABOR FORCE													
UNEMPLOYMENT													
Percent of Labor Force													
Seasonally Adjusted Percent													
TOTAL EMPLOYMENT													

NOT YET AVAILABLE

OREGON NONAGRICULTURAL WAGE & SALARY EMPLOYMENT 1989 3/

TOTAL WAGE & SALARY	1,206.6	1,159.5	1,162.0	1,176.4	1,187.2	1,205.4	1,227.4	1,209.1	1,218.9	1,231.0	1,237.4	1,235.2	1,230.1
Wage & Salary Emp. Index (1977=100) 4/	128.8	126.6	126.7	127.5	127.7	128.4	129.1	129.2	129.4	129.6	129.9	130.2	130.5
GOODS PRODUCING 5/	263.8	248.6	245.7	250.5	254.3	259.6	270.4	275.2	280.9	278.2	273.1	266.0	262.7
SERVICE PRODUCING 6/	942.9	910.9	916.3	925.9	932.9	945.8	957.0	933.9	938.0	952.8	964.3	969.2	967.4
MANUFACTURING, TOTAL	217.2	209.0	206.5	208.5	209.7	212.7	221.6	225.4	229.7	226.9	222.4	217.5	216.2
Durable Goods	158.5	156.3	152.2	154.5	154.3	157.0	162.3	163.8	163.1	162.0	158.9	158.2	159.1
Lumber & Wood Products	66.9	67.5	63.2	63.6	63.7	64.8	69.6	70.4	69.6	68.8	67.9	67.5	66.7
Logging	12.1	11.8	11.5	11.1	10.9	11.8	12.7	13.1	13.0	12.9	12.7	12.2	11.4
Sawmills	22.7	22.2	21.3	21.6	22.1	22.3	23.6	23.9	23.6	23.2	22.9	22.9	22.8
Veneer & Plywood	15.7	17.3	14.6	14.7	14.6	14.4	16.4	16.4	16.0	15.9	15.8	15.8	15.9
Millwork & Structural Wood	10.4	10.1	10.1	10.4	10.3	10.4	10.7	10.7	10.7	10.5	10.4	10.4	10.5
Mobile Homes	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.9	1.9	1.9	1.8	1.9	1.9
Other Wood Products	4.2	4.3	3.9	4.0	4.0	4.1	4.4	4.4	4.4	4.4	4.3	4.3	4.2
Furniture & Fixtures	3.0	2.9	2.9	3.0	2.9	3.0	3.0	3.0	3.1	3.1	3.1	3.0	2.9
Stone, Clay, Glass, & Concrete	4.2	4.0	3.9	4.0	4.1	4.3	4.4	4.4	4.4	4.4	4.4	4.3	4.2
Primary Metals	11.0	10.4	10.4	10.6	10.7	10.8	11.0	11.2	11.3	11.2	11.3	11.3	11.3
Blast Furnaces, Iron & Steel 7/	5.6	5.3	5.4	5.5	5.5	5.5	5.6	5.7	5.9	5.7	5.8	5.8	5.8
Nonferrous Metals 7/	5.3	5.1	5.0	5.1	5.2	5.3	5.4	5.5	5.4	5.5	5.5	5.5	5.5
Fabricated Metals	12.3	12.2	12.4	12.7	12.7	12.5	12.4	12.4	12.3	12.1	12.1	12.0	11.8
Fabricated Structural Metals	5.3	5.3	5.5	5.7	5.7	5.4	5.2	5.2	5.2	5.0	5.0	5.0	4.9
Other Fabricated Metals	7.0	6.9	6.9	7.0	7.0	7.1	7.2	7.2	7.1	7.1	7.1	7.0	6.9
Machinery	17.6	16.9	17.0	17.1	17.4	17.7	17.8	17.9	18.0	17.9	17.7	17.6	17.8
Office & Computing Machines	4.5	4.2	4.2	4.2	4.3	4.4	4.5	4.6	4.8	4.8	4.8	4.6	4.7
Other Machinery	13.1	12.7	12.8	12.9	13.1	13.3	13.3	13.3	13.2	13.1	12.9	13.0	13.1
Electronic & Other Elect. Equip 7/	15.6	15.1	14.9	15.1	15.0	15.3	15.5	15.7	16.0	16.0	16.1	16.3	16.4
Transportation Equipment	11.4	11.0	11.1	11.8	11.2	12.0	11.9	12.2	11.9	12.1	10.0	10.0	12.1
Instruments & Related Products 7/	12.5	12.6	12.6	12.7	12.7	12.7	12.7	12.7	12.5	12.4	12.3	12.2	12.2
Miscellaneous Manufacturing	3.9	3.7	3.8	3.9	3.9	3.9	4.0	3.9	4.0	4.0	4.0	4.0	3.7
Nondurable Goods	58.7	52.7	54.3	54.0	55.4	55.7	59.3	61.6	66.6	64.9	63.5	59.3	57.1
Food & Kindred Products	23.6	19.4	20.1	19.5	20.5	20.7	23.7	26.1	30.8	29.3	28.2	23.9	21.5
Canning & Preserving	12.9	9.2	9.9	9.4	10.3	10.1	12.9	15.1	19.8	18.4	16.8	12.4	10.3
Other Food Products	10.8	10.2	10.2	10.1	10.2	10.6	10.8	11.0	11.0	10.9	11.4	11.5	11.2
Textile Mill Products	1.8	1.7	1.7	1.7	1.7	1.8	1.8	1.8	1.8	1.8	1.8	1.8	1.8
Apparel	2.7	2.6	2.6	2.7	2.7	2.6	2.7	2.6	2.7	2.7	2.7	2.7	2.8
Paper & Allied Products	9.1	8.4	9.1	9.0	9.0	9.1	9.3	9.4	9.3	9.2	9.0	9.1	9.1
Printing & Publishing	13.5	13.1	13.1	13.3	13.4	13.4	13.6	13.5	13.7	13.7	13.7	13.9	14.0
Chemicals & Allied Products	2.2	2.1	2.1	2.1	2.2	2.2	2.3	2.3	2.3	2.3	2.2	2.2	2.2
Petroleum & Asphalt Products	0.5	0.4	0.4	0.4	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.4	0.4
Rubber & Plastic Products	4.9	4.6	4.7	4.8	4.9	4.9	5.0	5.0	5.0	4.9	4.9	4.8	4.8
Leather Products	0.5	0.4	0.5	0.5	0.5	0.5	0.4	0.4	0.5	0.5	0.5	0.5	0.5
NONMANUFACTURING, TOTAL	989.5	950.5	955.5	967.9	977.5	992.7	1,005.8	983.7	989.2	1,004.1	1,015.0	1,017.7	1,013.9
Mining & Quarrying	1.4	1.1	1.1	1.2	1.3	1.4	1.5	1.6	1.6	1.6	1.5	1.4	1.4
Construction	45.2	38.5	38.1	40.8	43.3	45.5	47.3	48.2	49.6	49.7	49.2	47.1	45.1
Building Construction	11.4	9.8	10.1	11.1	11.4	11.8	11.8	11.7	12.3	12.2	12.3	11.7	11.1
Heavy Construction	6.3	5.0	4.7	5.3	6.2	6.9	7.4	7.3	7.2	7.2	6.7	6.1	5.4
Special Trade Contractors	27.5	23.7	23.3	24.4	25.7	26.8	28.1	29.2	30.1	30.3	30.2	29.3	28.6

1989 Continued	Annual 2/ Average	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Transport., Comm., & Utilities	62.9	61.0	61.1	61.1	61.8	62.4	63.2	62.9	63.2	64.2	63.9	64.2	65.2
Transportation	41.6	40.1	40.1	40.0	40.6	41.1	41.7	41.4	41.8	42.9	42.7	42.9	43.8
Railroad Transportation	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.9	3.8
Trucking & Warehousing	24.0	23.0	22.9	22.8	23.0	23.4	24.0	24.3	24.5	24.8	24.6	24.9	25.7
Other Transportation	13.7	13.2	13.3	13.3	13.7	13.8	13.8	13.2	13.4	14.2	14.2	14.1	14.3
Communications	12.5	12.4	12.4	12.4	12.4	12.4	12.5	12.6	12.6	12.6	12.5	12.5	12.5
Utilities	8.8	8.5	8.6	8.7	8.8	8.9	9.0	8.9	8.8	8.7	8.7	8.8	8.9
Wholesale & Retail Trade	309.6	294.5	292.8	295.9	299.1	305.1	311.0	313.3	316.2	319.4	319.2	323.9	324.8
Wholesale Trade	78.2	74.5	75.1	76.0	76.0	76.7	78.0	78.9	80.0	81.0	80.8	80.6	80.5
Durable Goods	45.7	44.0	44.2	44.7	44.7	45.2	46.0	46.5	46.6	46.4	46.5	46.8	46.9
Machinery, Equipment, & Sup.	10.8	10.4	10.4	10.5	10.7	10.8	11.0	11.0	11.0	10.9	10.9	10.9	11.0
Other Durable Goods	34.9	33.6	33.8	34.2	34.0	34.4	35.0	35.5	35.6	35.5	35.6	35.9	35.9
Nondurable Goods	32.5	30.5	30.9	31.3	31.3	31.5	32.0	32.4	33.4	34.6	34.3	33.8	33.6
Groceries & Related Products	12.5	11.7	11.8	11.8	11.6	11.6	11.7	11.9	13.1	14.2	14.0	13.5	13.3
Other Nondurable Goods	20.0	18.8	19.1	19.5	19.7	19.9	20.3	20.5	20.3	20.4	20.3	20.3	20.3
Retail Trade	231.4	220.0	217.7	219.9	223.1	228.4	233.0	234.4	236.2	238.4	238.4	243.3	244.3
Building Materials & Garden Sup.	8.1	6.9	7.0	7.4	7.8	8.1	8.4	8.6	8.7	8.7	8.5	8.4	8.5
General Merchandise Stores	29.6	29.3	27.7	27.3	27.4	27.7	28.2	28.8	29.0	30.0	31.2	33.8	34.6
Food Stores	39.4	37.1	36.8	37.2	37.9	39.6	40.0	40.5	40.7	40.4	40.6	40.8	41.2
Auto Dealers & Service Stations	28.9	27.8	28.1	28.3	28.8	29.1	29.3	29.6	29.3	29.4	29.3	29.2	28.9
Apparel & Accessory Stores	9.8	9.4	8.9	8.9	8.9	9.1	9.7	10.0	10.2	10.0	9.8	10.9	11.2
Furniture & Home Furnishings	9.2	9.0	9.0	9.0	9.0	9.0	9.1	8.9	9.1	9.5	9.4	9.8	10.1
Eating & Drinking Places	82.3	77.0	77.0	78.5	80.2	82.3	84.7	85.1	85.5	86.3	84.4	83.7	82.4
Miscellaneous Retail	24.2	23.5	23.2	23.3	23.1	23.5	23.6	22.9	23.7	24.1	25.2	26.7	27.4
Finance, Insurance, and Real Estate	75.3	73.1	73.6	74.3	74.7	75.5	76.5	76.8	76.8	76.0	75.7	75.5	75.4
Finance	27.9	27.6	27.6	27.8	27.7	27.8	28.0	28.1	28.2	28.0	27.9	28.1	28.0
Insurance	22.2	22.1	22.2	22.2	22.2	22.3	22.5	22.4	22.4	22.2	22.0	22.0	22.0
Real Estate	25.2	23.4	23.8	24.3	24.8	25.4	26.0	26.3	26.2	25.8	25.8	25.4	25.4
Services	279.9	268.0	271.9	275.7	278.7	280.8	283.2	282.8	284.1	285.9	284.4	282.7	281.1
Hotels & Other Lodging Places	18.4	16.5	16.8	17.2	18.0	18.4	19.7	20.1	20.2	19.3	18.7	18.2	17.7
Personal Services	10.9	10.7	11.0	11.2	11.1	11.0	11.0	10.9	10.8	10.9	10.7	10.6	10.7
Business Services	46.7	43.8	44.7	45.3	46.2	47.3	48.1	47.4	48.0	48.9	47.9	46.9	45.6
Automotive & Misc. Repair Services	15.2	14.4	14.5	14.7	15.1	15.2	15.4	15.7	15.7	15.5	15.4	15.3	15.2
Motion Pictures & Amusements	14.1	13.5	13.6	14.0	14.2	14.5	14.6	14.5	14.5	14.5	13.7	13.3	13.7
Health Services	82.1	79.7	80.1	80.9	80.8	81.2	82.2	82.8	83.3	83.3	83.2	83.6	84.1
Legal Services	8.7	8.5	8.6	8.6	8.6	8.7	8.9	8.8	8.7	8.7	8.6	8.6	8.6
Private Education	14.3	14.6	15.4	15.4	15.5	15.1	12.5	11.7	11.6	14.3	15.2	15.2	14.6
Social Services	24.4	23.5	23.7	23.9	24.1	24.3	24.5	24.0	24.1	24.9	25.0	25.1	25.5
Engineering & Management Services	19.0	18.2	18.8	19.3	19.4	19.0	19.0	18.8	19.0	18.7	19.1	19.2	19.1
Other Services & NEC	26.4	24.6	24.7	25.2	25.7	26.1	27.3	28.1	28.2	26.9	26.9	26.7	26.3
Government	215.2	214.3	216.9	218.9	218.6	222.0	223.1	198.1	197.7	207.3	221.1	222.9	220.9
Federal Government	32.2	30.9	30.2	30.2	31.3	32.1	33.2	33.5	33.5	33.6	32.9	32.4	32.9
State Government	59.2	59.0	60.2	60.7	60.1	60.5	61.7	56.4	56.6	55.4	59.9	60.1	59.6
Education	24.2	24.5	25.6	25.8	25.4	25.7	25.8	20.5	20.1	20.1	25.3	25.8	25.5
Other State	35.0	34.5	34.6	34.9	34.7	34.8	35.9	35.9	36.5	35.3	34.6	34.3	34.1
Local Government	123.7	124.4	126.5	128.0	127.2	129.4	128.2	108.2	107.6	118.3	128.3	130.4	128.4
Education	77.0	79.8	81.7	82.7	81.7	82.4	79.8	59.3	58.4	70.6	81.6	83.9	82.0
Other Local	46.8	44.6	44.8	45.3	45.5	47.0	48.4	48.9	49.2	47.7	46.7	46.5	46.4
LABOR-MANAGEMENT DISPUTES	1.8	1.2	3.8	3.8	3.8	3.6	0.3	0.3	0.3	0.4	2.0	2.0	0.4

1/ Includes employed and unemployed individuals 16 years and older by place of residence. Data are adjusted for multiple job-holding and commuting. Includes nonagriculture wage and salary, self-employed, unpaid family workers, domestics, agriculture and labor disputants. ALL DATA ARE IN THOUSANDS

2/ Sum of monthly estimates divided by 12. Unemployment rate derived by dividing unemployment by civilian labor force.

3/ This nonagricultural wage and salary employment series is based on the 1987 Standard Industrial Classification (SIC) manual. The data are by place of work and persons working multiple jobs are counted more than once. Workers involved in labor-management disputes are excluded from the wage and salary employment totals. ALL DATA ARE IN THOUSANDS

4/ Total nonagricultural wage and salary employment, seasonally adjusted and indexed to 1977. Data on the earlier index (1972 = 100) can be converted to the 1977 base period by multiplying by a factor of .8264, the ratio between 1972's annual average employment (774.3) and that of 1977 (936.9).

5/ Goods producing industries include manufacturing, mining, and construction.

6/ Service producing industries include transportation, communications, & utilities; trade; finance, insurance, & real estate; services; and government.

7/ Series break. Data for 1988 and thereafter are not comparable to those for 1987 and before.

State of Oregon
EMPLOYMENT DIVISION
Department of Human Resources

Research and Statistics
March 1989 Benchmark
February 1990

OREGON RESIDENT LABOR FORCE, UNEMPLOYMENT & EMPLOYMENT 1988 1/

	Annual 2/ Average	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
CIVILIAN LABOR FORCE													
UNEMPLOYMENT													
Percent of Labor Force													
Seasonally Adjusted Percent					NOT YET AVAILABLE								
TOTAL EMPLOYMENT													

OREGON NONAGRICULTURAL WAGE & SALARY EMPLOYMENT 1988 3/

TOTAL WAGE & SALARY	1,156.0	1,101.5	1,112.8	1,123.2	1,135.0	1,148.0	1,167.0	1,154.2	1,169.0	1,182.2	1,192.2	1,194.8	1,191.6
Wage & Salary Emp. Index (1977=100) 4/	123.4	120.2	121.2	121.6	122.0	122.3	122.7	123.5	124.3	124.6	125.2	126.0	126.4
GOODS PRODUCING 5/	255.3	239.4	242.0	242.7	246.9	250.1	256.7	262.7	271.1	268.3	266.8	260.8	256.4
SERVICE PRODUCING 6/	900.6	862.1	870.8	880.5	888.1	897.9	910.3	891.5	897.9	913.9	925.4	934.0	935.2
MANUFACTURING, TOTAL	214.2	205.7	207.3	206.6	208.5	209.9	214.5	218.4	225.3	222.1	220.9	216.9	213.7
Durable Goods	156.5	151.6	152.9	152.5	154.4	155.2	155.8	158.7	160.5	158.9	160.0	159.4	158.2
Lumber & Wood Products	68.8	67.6	68.0	67.3	68.0	68.8	68.6	69.1	70.4	68.9	70.5	69.8	68.8
Logging	12.8	12.3	12.5	11.9	11.9	12.4	13.3	13.8	14.0	11.2	13.7	13.6	12.8
Sawmills	22.6	22.1	22.3	22.4	22.6	22.7	22.3	22.2	22.6	23.4	23.2	22.8	22.8
Veneer & Plywood	17.3	17.7	17.7	17.6	17.8	17.7	16.7	16.4	16.9	17.5	17.2	17.0	16.9
Millwork & Structural Wood	10.1	9.7	9.7	9.6	9.8	10.0	10.4	10.6	10.6	10.5	10.3	10.2	10.2
Mobile Homes	1.6	1.4	1.4	1.4	1.4	1.5	1.6	1.7	1.8	1.8	1.8	1.8	1.8
Other Wood Products	4.4	4.4	4.4	4.4	4.5	4.5	4.3	4.4	4.5	4.5	4.3	4.4	4.3
Furniture & Fixtures	2.9	2.6	2.6	2.7	2.8	2.8	2.9	3.0	3.0	3.0	3.0	3.0	3.0
Stone, Clay, Glass, & Concrete	4.0	3.6	3.6	3.7	3.9	4.0	4.1	4.2	4.3	4.4	4.3	4.2	4.2
Primary Metals	10.2	9.8	9.8	9.9	10.0	10.1	10.3	10.4	10.4	10.4	10.3	10.3	10.3
Blast Furnaces, Iron & Steel 7/	5.1	4.9	4.8	4.9	5.0	5.0	5.1	5.2	5.2	5.2	5.2	5.2	5.3
Nonferrous Metals 7/	5.1	4.9	5.0	5.0	5.0	5.1	5.2	5.2	5.2	5.2	5.1	5.1	5.0
Fabricated Metals	11.2	10.1	10.2	10.4	10.6	10.7	11.0	11.4	11.6	11.6	11.9	12.2	12.4
Fabricated Structural Metals	4.6	4.2	4.2	4.3	4.4	4.4	4.5	4.7	4.7	4.7	4.9	5.2	5.4
Other Fabricated Metals	6.5	5.9	6.0	6.1	6.2	6.3	6.5	6.7	6.9	6.9	7.0	7.0	7.0
Machinery	16.8	16.4	16.7	16.8	16.7	16.5	16.6	16.9	17.0	17.0	17.0	16.8	16.9
Office & Computing Machines	4.1	4.1	4.2	4.2	4.0	3.8	3.8	4.1	4.2	4.2	4.3	4.3	4.3
Other Machinery	12.7	12.3	12.5	12.6	12.7	12.7	12.8	12.8	12.8	12.8	12.7	12.5	12.6
Electronic & Other Elect. Equip 7/	14.1	13.3	13.4	13.4	13.6	13.8	13.9	14.3	14.5	14.6	14.6	14.8	15.0
Transportation Equipment	11.6	11.2	11.5	11.1	11.6	11.5	11.3	12.4	12.3	12.0	11.4	11.4	11.1
Instruments & Related Products 7/	13.2	13.5	13.5	13.5	13.5	13.3	13.2	13.1	13.1	13.1	12.9	12.8	12.6
Miscellaneous Manufacturing	3.8	3.5	3.6	3.7	3.7	3.7	3.9	3.9	3.9	3.9	4.1	4.1	3.9
Nondurable Goods	57.6	54.1	54.4	54.1	54.1	54.7	58.7	59.7	64.8	63.2	60.9	57.5	55.5
Food & Kindred Products	23.7	20.6	20.8	20.3	20.0	21.1	24.2	25.7	30.6	29.0	27.2	23.8	21.5
Canning & Preserving	12.8	9.8	10.2	9.6	9.4	10.3	13.2	14.6	19.5	18.0	15.9	12.6	10.5
Other Food Products	10.9	10.8	10.6	10.7	10.6	10.8	11.0	11.1	11.1	11.0	11.3	11.2	11.0
Textile Mill Products	1.8	1.8	1.8	1.8	1.8	1.7	1.8	1.7	1.8	1.7	1.8	1.7	1.7
Apparel	2.6	2.5	2.6	2.5	2.6	2.7	2.7	2.6	2.6	2.7	2.7	2.7	2.7
Paper & Allied Products	8.6	8.8	8.8	8.9	8.8	8.2	8.9	8.6	8.5	8.5	8.2	8.3	8.4
Printing & Publishing	13.2	13.1	13.1	13.1	13.2	13.2	13.2	13.2	13.2	13.3	13.1	13.2	13.4
Chemicals & Allied Products	2.1	2.1	2.1	2.1	2.2	2.2	2.2	2.1	2.2	2.2	2.1	2.1	2.1
Petroleum & Asphalt Products	0.5	0.5	0.5	0.5	0.5	0.5	0.6	0.6	0.6	0.5	0.6	0.5	0.5
Rubber & Plastic Products	4.6	4.3	4.3	4.4	4.5	4.6	4.6	4.7	4.8	4.8	4.7	4.7	4.7
Leather Products	0.5	0.4	0.4	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
NONMANUFACTURING, TOTAL	941.8	895.8	905.5	916.6	926.5	938.1	952.5	935.8	943.7	960.1	971.3	977.9	977.9
Mining & Quarrying	1.3	1.2	1.3	1.2	1.3	1.3	1.4	1.4	1.4	1.4	1.4	1.3	1.2
Construction	39.9	32.5	33.4	34.9	37.1	38.9	40.8	42.9	44.4	44.8	44.5	42.6	41.5
Building Construction	9.6	8.3	8.3	8.5	8.9	9.1	9.5	9.8	10.3	10.5	10.5	10.5	10.4
Heavy Construction	6.2	4.1	4.4	4.8	5.7	6.4	6.8	7.2	7.6	7.7	7.4	6.6	6.0
Special Trade Contractors	24.1	20.1	20.7	21.6	22.5	23.4	24.5	25.9	26.5	26.6	26.6	25.5	25.1

1988 Continued	Annual 2/ Average	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sep.	Oct.	Nov.	Dec.
Transport., Comm., & Utilities	60.5	58.2	58.6	59.0	59.2	59.7	60.7	60.4	61.3	62.0	61.9	62.1	62.6
Transportation	39.3	37.0	37.4	37.7	37.9	38.4	39.3	39.1	40.0	40.9	40.9	41.1	41.7
Railroad Transportation	3.9	3.8	3.8	3.9	3.9	3.9	3.9	3.9	3.9	3.9	4.0	4.0	3.9
Trucking & Warehousing	22.8	21.2	21.4	21.4	21.7	22.0	22.7	23.1	23.6	23.8	23.7	23.9	24.6
Other Transportation	12.6	12.0	12.2	12.4	12.3	12.5	12.7	12.1	12.5	13.2	13.2	13.2	13.2
Communications	12.5	12.5	12.5	12.5	12.5	12.5	12.5	12.5	12.5	12.4	12.4	12.4	12.3
Utilities	8.7	8.7	8.7	8.8	8.8	8.8	8.9	8.8	8.8	8.7	8.6	8.6	8.6
Wholesale & Retail Trade	292.4	276.2	275.9	279.2	283.0	287.1	293.2	297.1	299.5	301.9	301.5	305.4	309.0
Wholesale Trade	72.9	68.8	69.5	70.2	71.2	71.6	73.2	74.0	74.5	75.6	75.2	75.3	75.4
Durable Goods	42.7	40.6	40.8	41.1	41.8	42.4	43.0	43.4	43.7	43.9	43.6	43.9	44.2
Machinery, Equipment, & Sup.	10.2	9.6	9.6	9.8	10.0	10.2	10.4	10.4	10.5	10.5	10.3	10.4	10.5
Other Durable Goods	32.5	31.0	31.2	31.3	31.8	32.2	32.6	33.0	33.2	33.4	33.3	33.5	33.7
Nondurable Goods	30.2	28.2	28.7	29.1	29.4	29.2	30.2	30.6	30.8	31.7	31.6	31.4	31.2
Groceries & Related Products	11.6	10.8	10.9	10.9	11.0	10.8	11.3	11.5	11.7	12.7	12.7	12.4	12.1
Other Nondurable Goods	18.6	17.4	17.8	18.2	18.4	18.4	18.9	19.1	19.1	19.0	18.9	19.0	19.1
Retail Trade	219.5	207.4	206.4	209.0	211.8	215.5	220.0	223.1	225.0	226.3	226.3	230.1	233.6
Building Materials & Garden Sup.	7.2	6.5	6.5	6.9	7.1	7.3	7.5	7.5	7.5	7.5	7.3	7.2	7.1
General Merchandise Stores	28.6	28.6	27.1	27.1	26.8	26.9	27.2	28.1	28.5	28.7	29.7	31.5	33.0
Food Stores	36.4	33.8	34.1	34.4	34.4	35.3	36.3	37.4	37.7	38.2	38.6	38.3	38.7
Auto Dealers & Service Stations	28.0	26.4	26.4	26.9	27.7	27.9	28.5	28.5	29.0	29.1	28.8	28.5	28.3
Apparel & Accessory Stores	9.2	8.4	8.1	8.3	8.3	8.5	9.2	10.0	9.7	9.5	9.3	10.1	10.6
Furniture & Home Furnishings	8.3	8.2	8.0	8.0	8.1	8.1	8.2	8.2	8.3	8.4	8.6	8.8	9.1
Eating & Drinking Places	78.9	73.6	74.1	75.2	77.4	79.5	81.2	81.7	82.3	82.6	80.4	79.9	79.4
Miscellaneous Retail	22.9	21.9	22.1	22.2	22.0	22.0	21.9	21.7	22.0	22.3	23.6	25.8	27.4
Finance, Insurance, and Real Estate	73.3	71.7	72.0	72.2	72.4	72.8	73.8	73.9	74.5	74.4	73.7	73.5	74.2
Finance	27.6	27.5	27.5	27.6	27.8	27.8	27.9	27.5	27.6	27.6	27.5	27.4	27.6
Insurance	21.9	21.4	21.4	21.5	21.6	21.7	21.9	21.9	22.1	22.1	22.0	22.2	22.4
Real Estate	23.8	22.8	23.1	23.1	23.0	23.3	24.0	24.5	24.8	24.7	24.2	23.9	24.2
Services	263.2	247.0	251.9	255.9	259.4	259.8	263.8	265.3	268.4	270.9	270.9	272.6	273.0
Hotels & Other Lodging Places	17.1	15.0	15.2	15.8	16.4	16.9	18.2	19.0	19.4	18.8	17.4	16.7	16.6
Personal Services	10.4	10.3	10.4	10.5	10.7	10.4	10.2	10.1	10.2	10.3	10.4	10.5	10.6
Business Services	43.0	37.9	39.1	39.8	41.0	41.6	42.8	43.6	45.3	45.6	45.7	47.4	46.3
Automotive & Misc. Repair Services	13.8	12.6	12.9	13.1	13.1	13.4	13.8	14.3	14.5	14.4	14.3	14.3	14.5
Motion Pictures & Amusements	13.1	12.3	12.3	12.7	13.0	12.9	13.4	14.1	14.3	13.4	12.6	12.7	13.7
Health Services	77.7	75.0	75.4	76.1	76.7	76.7	77.6	77.5	78.1	79.1	79.4	79.7	80.5
Legal Services	8.5	8.2	8.2	8.3	8.4	8.4	8.6	8.6	8.6	8.6	8.6	8.6	8.6
Private Education	13.8	13.9	14.8	14.9	14.8	14.2	12.2	10.8	10.7	13.8	15.2	15.5	15.1
Social Services	23.3	22.4	22.9	23.0	23.2	23.4	23.3	23.0	23.1	23.6	23.9	24.0	23.9
Engineering & Management Services	17.3	16.1	17.0	17.3	17.3	16.7	17.1	17.4	17.3	17.4	17.6	17.8	18.0
Other Services & NEC	25.3	23.3	23.7	24.4	24.8	25.2	26.6	26.9	26.9	25.9	25.8	25.4	25.2
Government	211.2	209.0	212.4	214.2	214.1	218.5	218.8	194.8	194.2	204.7	217.4	220.4	216.4
Federal Government	31.7	30.0	29.5	29.6	30.4	31.3	33.0	33.3	33.0	33.0	33.2	31.8	31.8
State Government	58.6	57.7	58.9	59.3	59.3	59.7	60.5	55.8	56.4	55.8	60.2	60.4	59.6
Education	23.9	24.4	25.5	25.7	25.3	25.5	25.6	19.9	19.5	19.8	25.2	25.7	25.2
Other State	34.7	33.3	33.4	33.6	34.0	34.2	34.9	35.9	36.9	36.0	35.0	34.7	34.4
Local Government	121.0	121.3	124.0	125.3	124.4	127.5	125.3	105.7	104.8	115.9	124.0	128.2	125.0
Education	75.4	77.9	80.3	81.0	80.1	81.0	78.6	58.0	57.1	69.5	78.9	81.9	80.1
Other Local	45.6	43.4	43.7	44.3	44.3	46.5	46.7	47.7	47.7	46.4	45.1	46.3	44.9
LABOR-MANAGEMENT DISPUTES	1.4	0.1	0.1	0.2	0.1	0.7	2.4	4.9	3.8	1.1	0.8	1.2	1.2

1/ Includes employed and unemployed individuals 16 years and older by place of residence. Data are adjusted for multiple job-holding and commuting. Includes nonagriculture wage and salary, self-employed, unpaid family workers, domestics, agriculture and labor disputants. ALL DATA ARE IN THOUSANDS

2/ Sum of monthly estimates divided by 12. Unemployment rate derived by dividing unemployment by civilian labor force.

3/ This nonagricultural wage and salary employment series is based on the 1987 Standard Industrial Classification (SIC) manual. The data are by place of work and persons working multiple jobs are counted more than once. Workers involved in labor-management disputes are excluded from the wage and salary employment totals. ALL DATA ARE IN THOUSANDS

4/ Total nonagricultural wage and salary employment, seasonally adjusted and indexed to 1977. Data on the earlier index (1972 = 100) can be converted to the 1977 base period by multiplying by a factor of .8264, the ratio between 1972's annual average employment (774.3) and that of 1977 (936.9).

5/ Goods producing industries include manufacturing, mining, and construction.

6/ Service producing industries include transportation, communications, & utilities; trade; finance, insurance, & real estate; services; and government.

7/ Series break. Data for 1988 and thereafter are not comparable to those for 1987 and before.

Local government laid off 400 fewer workers than expected in January. State and federal agencies performed as expected. This means that government as a whole showed the same employment strength as the private sector.

It is a bit early to talk about meaning behind this broad-based retention of workers in the first month of 1990. Certainly the strength of the Oregon economy itself can claim most of the credit. One could also speculate that the structure of some businesses might be changing to reflect the worker shortage. There must be a point at which it becomes more productive to retain workers during slack times like winter than it is to scrounge for new workers in the spring when everyone else is gearing up too.

The effects of the sprinkling of inmigrants into the present economic stew are hard to tell, because the economy is not going to be the only chef in the kitchen. Politics, too, will be changing the very recipe which will determine the taste of future economic meals. Some questions are:

- How much will Oregon citizens and employers be willing to pay to retrain workers with outdated skills and to bring into the work force those who have never had the skills?
- How much and which kinds of growth will Oregonians tolerate when push comes to shove? Many of the state's key livability features seem to be at odds with continuing rapid economic and population growth. Oregonians want both a growing economy and an uncrowded environment with a rural character, even in areas near major urban centers.

The challenge to Oregonians in the 1990s will be to maintain a growing economy, to bring disadvantaged citizens into the work force as part of the solution to the labor shortage, and to deal with growth and prosperity without losing those qualities which have made Oregon attractive in the first place.

A much more thorough discussion of these and other issues concerning Oregon's labor force in the 1990s will be available this spring in a special Employment Division report entitled **Oregon WorkForce at Risk**. Its publication will be announced in **Oregon Labor Trends**. □

HOURS AND EARNINGS OF OREGON WORKERS IN SELECTED INDUSTRIES[1]
1989 and 1988 Annual Average on 1989 Benchmark

	Average Weekly Earnings		Average Weekly Hours		Average Hourly Earnings	
	1989	1988	1989	1988	1989	1988
TOTAL MANUFACTURING[2]	$425.52	$416.58	39.4	39.3	$10.80	$10.60
Durable Goods	433.22	427.57	39.6	39.7	10.94	10.77
Lumber & Wood Products	432.38	428.76	39.2	39.3	11.03	10.91
Logging & Sawmills	464.10	457.43	39.0	38.7	11.90	11.82
Veneer & Plywood	421.86	429.20	39.5	40.3	10.68	10.65
Millwork & Structural	362.87	356.09	39.4	40.1	9.21	8.88
Mobile Homes	332.30	321.15	36.8	37.3	9.03	8.61
Other Wood Products	421.20	413.60	40.0	40.0	10.53	10.34
Furniture & Fixtures	346.51	313.63	37.1	36.3	9.34	8.64
Primary Metals	503.40	504.64	41.5	42.3	12.13	11.93
Fabricated Metals	397.49	388.66	39.2	39.7	10.14	9.79
Machinery (Ex Electrical)	448.74	440.30	40.5	40.1	11.08	10.98
Nondurable Goods	401.05	386.45	38.6	38.3	10.39	10.09
Food & Kindred Products	328.62	316.20	37.6	37.2	8.74	8.50
Canning & Preserving	279.33	267.90	36.9	36.8	7.57	7.28
Other Food Products	412.06	393.78	38.8	37.9	10.62	10.39
Textile Mill Products	247.09	238.33	34.9	35.1	7.08	6.79
Apparel	255.26	233.95	38.5	36.9	6.63	6.34
Paper & Allied Products	645.85	638.50	42.8	43.2	15.09	14.78
Printing & Publishing	427.85	401.79	36.6	36.1	11.69	11.13
NONMANUFACTURING						
Construction[2]	561.74	525.26	37.3	36.2	15.06	14.51
Communications & Utilities[3]	550.53	534.97	41.3	40.9	13.33	13.08
Trade[3]	317.97	303.56	34.6	34.3	9.19	8.85
Wholesale Trade	424.78	406.15	38.2	38.1	11.12	10.66
Retail Trade	263.71	252.07	32.8	32.4	8.04	7.78
Banking & Insurance[3]	344.45	329.50	37.4	37.7	9.21	8.74
State & Local Government	396.26	376.90				

[1]Figures are average gross hours and earnings of full and part-time worked or paid for, including overtime and shift premium pay. Prepared in cooperation with the U.S. Department of Labor. All data are based on the 1987 Standard Industrial Classification (SIC) codes.
[2]Data for production workers only and exclude administrative, supervisory (above working foremen), technical, sales and office personnel.
[3]Data for nonsupervisory employees only, excluding proprietors and executive personnel. Data for retail trade excludes eating and drinking places.

BENCHMARK SUMMARY: WEAKER GROWTH GETS STRONGER

Graham Slater

With a title like this, readers will probably fall into two groups. Some will be eaten up with curiosity to find out how an entire article can develop such a theme, while others will search frantically for the comics. At least for the curious group, the following provides a summary of the once-yearly series of events known collectively as "benchmarking."

Let's start with a definition. In the context of employment estimating, benchmarking is an annual project which replaces monthly sample-based employment estimates with near-universe counts from unemployment insurance tax and other records. Benchmarking is completed in early February at which time data for both of the previous two years are republished. By its nature, benchmarking focuses interest on the size of the revisions which are made to the initial estimates and on the effect that these revisions have on measures of the state's economic health. We will review these and other items one by one:

Size of Revision

Total wage and salary employment was revised upwards by 3,700 (+0.3%) for the 1988 annual average and 10,700 (+0.9%) for 1989. The main causal factors were stronger than anticipated growth in construction and services, both of which registered large numbers of new firms. (Monthly employment estimates include a variable to estimate this growth in new firms which are, by nature, not part of the ongoing sample. In these two industries, however, the magnitude of the growth among such firms was underestimated.)

Several important industries experienced little or no revision for 1989. These included total manufacturing (+200); lumber & wood products (-100); food stores (no revision); finance, insurance, & real estate (FIRE) (+100); and government (no revision).

Revised Employment Data -- 1988 and 1989

An accompanying table gives annual average employment for these two years, by major industry. Significant facts for consideration include:

- With the exception of lumber & wood products, manufacturing industries generally fared well last year. Of 19 major manufacturing industries, only 4 recorded employment losses between 1988 and 1989. Several -- primary metals (+800), fabricated metals (+1,100), machinery (+800), and electronic & other electric equipment (+1,500) -- grew strongly, while both printing & publishing and rubber & plastic products reached record levels.
- Lumber & wood products employment dropped by 1,900, largely due to a series of well-publicized mill closures. The impact was felt most in veneer & plywood (-1,600) and logging (-700). Some interest has focused on the role of labor disputes on these year-to-year employment changes. (Those with good memories will remember widespread strikes during the summer of 1988 and the massive Roseburg Lumber strike early in 1989.) After adjusting lumber & wood products employment data to remove any effect from these disputes, the employment decline between 1988 and 1989 is moderated slightly to -1,300. Most of the adjustment falls in the veneer & plywood industry where the over-the-year loss turns into a "labor dispute adjusted" -1,200.
- Construction employment grew by 5,300 (+13.3%) in 1989, following the addition of 4,600 jobs (+13.0%) in 1988. Growth was concentrated in residential & commercial building, along with associated special trades such as electrical, plumbing, heating, & air conditioning contractors.
- The transportation, communications, & utilities (TCU) sector grew more slowly than the economy in general, but this slow growth was not evenly distributed. Neither rail-

NONAGRICULTURAL WAGE AND SALARY EMPLOYMENT BY MAJOR INDUSTRY
ACTUAL CHANGE: 1989 VS. 1988 ANNUAL AVERAGES

INDUSTRY	1989 AA	1988 AA	ACTUAL CHANGE	PERCENT CHANGE
TOTAL WAGE & SALARY	**1,206,600**	**1,156,000**	**50,600**	**4.4%**
Goods Producing	263,800	255,300	8,500	3.3%
Service Producing	942,900	900,600	42,300	4.7%
Total Manufacturing	217,200	214,200	3,000	1.4%
Lumber & Wood Products	66,900	68,800	(1,900)	−2.8%
'High-tech' Industries	32,700	31,400	1,300	4.1%
Other Durables	58,900	56,300	2,600	4.6%
Food & Kindred Products	23,600	23,700	(100)	−0.4%
Other Nondurables	35,100	33,900	1,200	3.5%
Total Nonmanufacturing	989,500	941,800	47,700	5.1%
Mining & Quarrying	1,400	1,300	100	7.7%
Construction	45,200	39,900	5,300	13.3%
Transport., Comm., & Utilities	62,900	60,500	2,400	4.0%
Wholesale & Retail Trade	309,600	292,400	17,200	5.9%
Wholesale Trade	78,200	72,900	5,300	7.3%
Retail Trade	231,400	219,500	11,900	5.4%
Finance, Insurance, and Real Estate	75,300	73,300	2,000	2.7%
Services	279,900	263,200	16,700	6.3%
Government	215,200	211,200	4,000	1.9%
Federal Government	32,200	31,700	500	1.6%
State Government	59,200	58,600	600	1.0%
Local Government	123,700	121,000	2,700	2.2%
LABOR-MANAGEMENT DISPUTES	1,800	1,400	400	28.6%

roads nor communications employment changed, and utilities added just 100. On the other hand, transportation except railroads added more than 2,000 jobs, with roughly half in trucking & warehousing.

- Trade employment, which grew by a whopping 17,200 jobs, offered few surprises. Eating & drinking places (+3,400), food stores (+3,000), and general merchandise (+1,000) added the most jobs, while building materials & garden supplies and furniture & home furnishings each added 900 jobs to record double digit percent increases (+12.5% and +10.8% respectively).
- FIRE, like TCU, grew more slowly than the average. In this case, finance and insurance added few jobs, while real estate jumped up by 1,400 (+5.9%).
- Services industries added a total of 16,700 jobs (+6.3%). The most significant factor appcared to be the widespread nature of the growth -- of the eleven services industries for which employment data are now published, eight added at least 1,000 employees last year. In particular, health services and business services added 4,400 and 3,700 jobs respectively.
- Government employment grew much more slowly than employment in the private sector (+1.9% vs 4.9%). Most of the new jobs that did occur came in local government, distributed proportionately between education and non-education agencies.

Winners and Losers

This section is strictly for the numerically curious. While the accompanying table may have little to offer in terms of serious economic analysis, it does provide an interesting comparison between the good and the bad last year. Note how the "winners" columns contain a wide range of industries while the "losers" are limited to just a few.

A Word of Warning:

While annual average comparisons provide a good basis for overall comparisons, there is a value to looking at monthly trends in order to project forward into 1990 and beyond. An accompanying graph depicts employment differences between a particular month in one year, compared with the same month one year before. In other words, the data shown for March 1989 was computed as "March 1989 employment minus March 1988 employment." The word of warning results from the noticeable tailing off which occurred toward the end of 1989. This trend bears close watching in the early months of 1990.

SIC Revision:

Some readers will be intimately familiar with the Standard Industrial Classification (SIC) coding system and manual. For those who are not, it will suffice to say that all industry employment data published by the Oregon Employment Division (and by almost every economic or research agency in the public or private sector) uses the SIC system of coding establishments based on the type of economic activity in which they are engaged. The publication of these benchmarked data reflects the introduction of the new 1987 SIC Manual, which has now replaced the 1972 version. Many industry codes remained unchanged, but some were changed significantly. In particular, industry codes for rapidly changing and/or growing industries such as the high tech group and many services industries were changed (and improved). In addition, the entire FIRE sector was rewritten. One result of these changes was a handful of series breaks, for which data for 1988 and thereafter will not be comparable with those for 1987 and before. The series affected in this way are blast furnaces, iron & steel (SIC 331,2,9), nonferrous metals (other 33), electronic & other electric equipment (36), and instruments & related products (38).

Introduction of New Published Employment Tables:

Given the number of changes forced on us by the SIC revision, this became a good year to review the industries for which we publish employment data. As a result of our own analysis and requests from interested data users we will, starting with 1988 data, be publishing several additional series. These include a breakout between logging and sawmills, 2-digit SIC detail in construction, trade, and most of services, and a clean definition giving separate data series for finance, insurance, and real estate. New annual tables for 1988 and 1989 are included in this edition of **Oregon Labor Trends** and will be distributed formally in the near future.

Hours and Earnings Data:

While most attention focuses on the employment series, hours & earnings data have also been revised for the past two years. Average hourly earnings increased just $0.20 between 1988 and 1989, rising from $10.60 to $10.80. An article in a future edition of **Oregon Labor Trends** will delve into the hours & earnings data more thoroughly. Until then, a table elsewhere in this edition summarizes the data for the past two years.

Readers with any questions regarding the above information are encouraged to contact Graham Slater at (503) 378-2477.□

WINNERS AND LOSERS --
ANNUAL AVERAGE EMPLOYMENT CHANGE, 1988 TO 1989

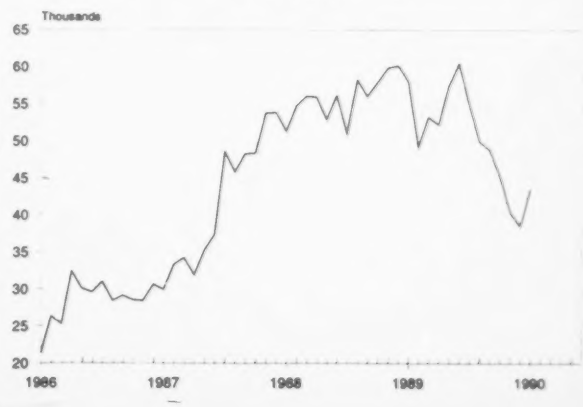
ACTUAL CHANGE

WINNERS		LOSERS	
Health Services	+ 4,400	Veneer and Plywood	- 1,600
Business Services	+ 3,700	Logging	- 700
Special Trade Contractors	+ 3,400	Instruments and Related Prods.	- 700
Eating and Drinking Places	+ 3,400	Other Wood Products	- 200
Food Stores	+ 3,000	Transportation Equipment	- 200

PERCENT CHANGE

WINNERS		LOSERS	
Building Construction	+ 18.8%	Veneer and Plywood	- 9.2%
Fabricated Structural Metals	+ 15.2%	Logging	- 5.5%
Special Trade Contractors	+ 14.1%	Instruments and Related Prods.	- 5.3%
Building Mats. & Garden Supps.	+ 12.5%	Other Wood Products	- 4.5%
		Transportation Equipment	- 1.7%
Mobile Homes	+ 12.5%		

NONAG WAGE & SALARY EMPLOYMENT GROWTH
OVER-THE-YEAR CHANGES



MINIMUM WAGE RISES

John Jagosh

On January 1, 1990, Oregon's minimum wage increased from $3.85 to $4.25 an hour. A further rise to $4.75 an hour will take effect on January 1, 1991.

This is not to be confused with the federal minimum wage which will increase from $3.35 to $3.90 an hour this April. According to Commissioner Mary Wendy Roberts of the Oregon Bureau of Labor and Industries, "the state rate exceeds the federal rate (so) employers come under the state law and must pay employees the higher minimum."

Paul Tiffany, administrator of the Bureau's Wage and Hour Division, reminds employers that federal provisions for a "tip credit" as an offset for the minimum wage and paying a lower than minimum "training wage" to teenagers who have not worked before do not apply in Oregon.

Also, under the new 1989 state law many of the exemptions from minimum wage have been narrowed or eliminated altogether to provide more employees with minimum wage coverage.

Still exempt are casual agricultural workers; youngsters paid piece rates for harvesting; baby sitters and other domestic homeworkers (exempt from the state rate but not the federal rate in some cases); and individuals engaged in the range production of livestock.

For additional information, contact the Bureau of Labor and Industries, Wage and Hour Division or the Technical Assitance Unit (phone 229-5841). □

STATE OF OREGON UNEMPLOYMENT RATES BY AREA

January 1990

	Civilian Labor Force	Total Employment	Unemployment	Rate[1]
State of Oregon	1,439,600	1,351,800	87,800	6.1
Eugene MSA[2]	145,800	137,100	8,700	6.0
Medford MSA[3]	71,060	65,820	5,240	7.4
Portland PMSA[4]	661,200	632,900	28,300	4.3
Salem MSA[5]	130,600	121,500	9,100	7.0
Baker	6,870	6,200	670	9.8
Benton	37,370	35,990	1,380	3.7
Clatsop	17,560	16,060	1,500	8.5
Columbia	17,360	16,060	1,300	7.5
Coos	26,690	23,980	2,710	10.2
Crook	7,070	6,560	510	7.2
Curry	9,200	8,320	880	9.6
Deschutes	40,160	37,270	2,890	7.2
Douglas	45,910	41,690	4,220	9.2
Gilliam	980	930	50	5.1
Grant	4,450	4,000	450	10.1
Harney	4,020	3,680	340	8.5
Hood River	9,700	8,940	760	7.8
Jefferson	6,410	5,880	530	8.3
Josephine	26,440	24,220	2,220	8.4
Klamath	25,730	23,380	2,350	9.1
Lake	3,960	3,430	530	13.4
Lincoln	18,990	17,480	1,510	8.0
Linn	42,830	38,970	3,860	9.0
Malheur	12,040	11,070	970	8.1
Morrow	3,720	3,300	420	11.3
Sherman	720	640	80	11.1
Tillamook	9,060	8,250	810	8.9
Umatilla	28,770	25,300	3,470	12.1
Union	11,130	10,340	790	7.1
Wallowa	3,720	3,450	270	7.3
Wasco	9,470	8,520	950	10.0
Wheeler	590	510	80	13.6

[1]*Not Seasonally Adjusted*
[2]*Lane County*
[3]*Jackson County*
[4]*Clackamas, Multnomah, Washington, Yamhill counties*
[5]*Marion and Polk counties*

LMI LABOR MARKET INFORMATION

STATE OF OREGON

OREGON LABOR TRENDS is published monthly by the Research and Statistics Section of the Oregon Employment Division,

D. R. Steward, Assistant Administrator
Perky Collins, Typesetting
Carol Schmidt, Graphic Artist
Jeffry Hannum, State Economist & Editor.

Please send any address changes to Research & Statistics, LMI Programs Unit, Room 207, 875 Union Street N.E., Salem, OR 97311 or Phone (503) 378-8657.

Material contained in this publication is in the public domain and may be reproduced without special permission. Please credit **OREGON LABOR TRENDS**, Oregon Employment Division.

STATE OF OREGON
EMPLOYMENT DIVISION
DEPARTMENT OF HUMAN RESOURCES
875 UNION STREET N.E.
SALEM, OREGON 97311

OFFICIAL BUSINESS
PENALTY FOR PRIVATE
USE $300

U.S. MAIL

POSTAGE AND FEES PAID
EMPLOYMENT SECURITY MAIL
LAB 449

90005038-21
CONGRESSIONAL INFORMATION SVC DEPT
SRI
4520 EAST-WEST HIGHWAY
BETHESDA MD 20814